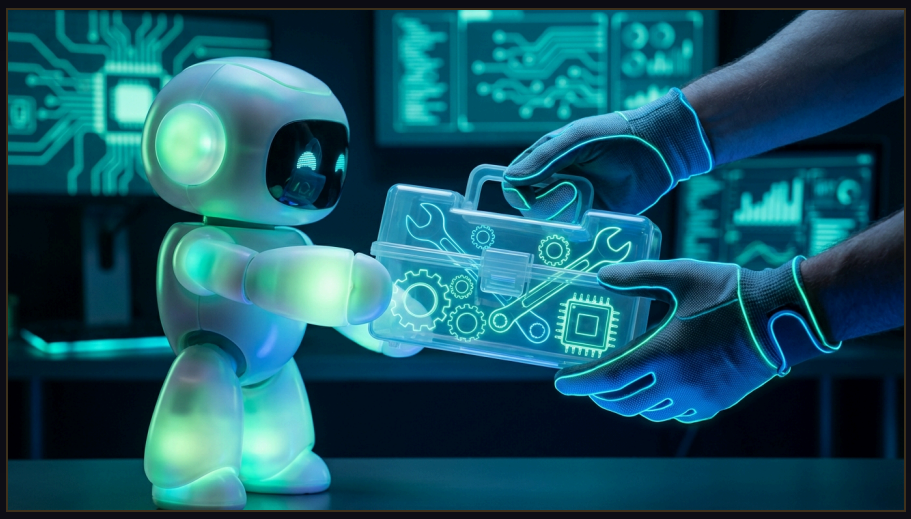
BEGINNER FRIENDLY

The DIY Automation Starter Kit

10 automations you can create with ANY AI - no coding experience required.

✓ Works with ChatGPT ✓ Works with Claude ✓ Works with Gemini

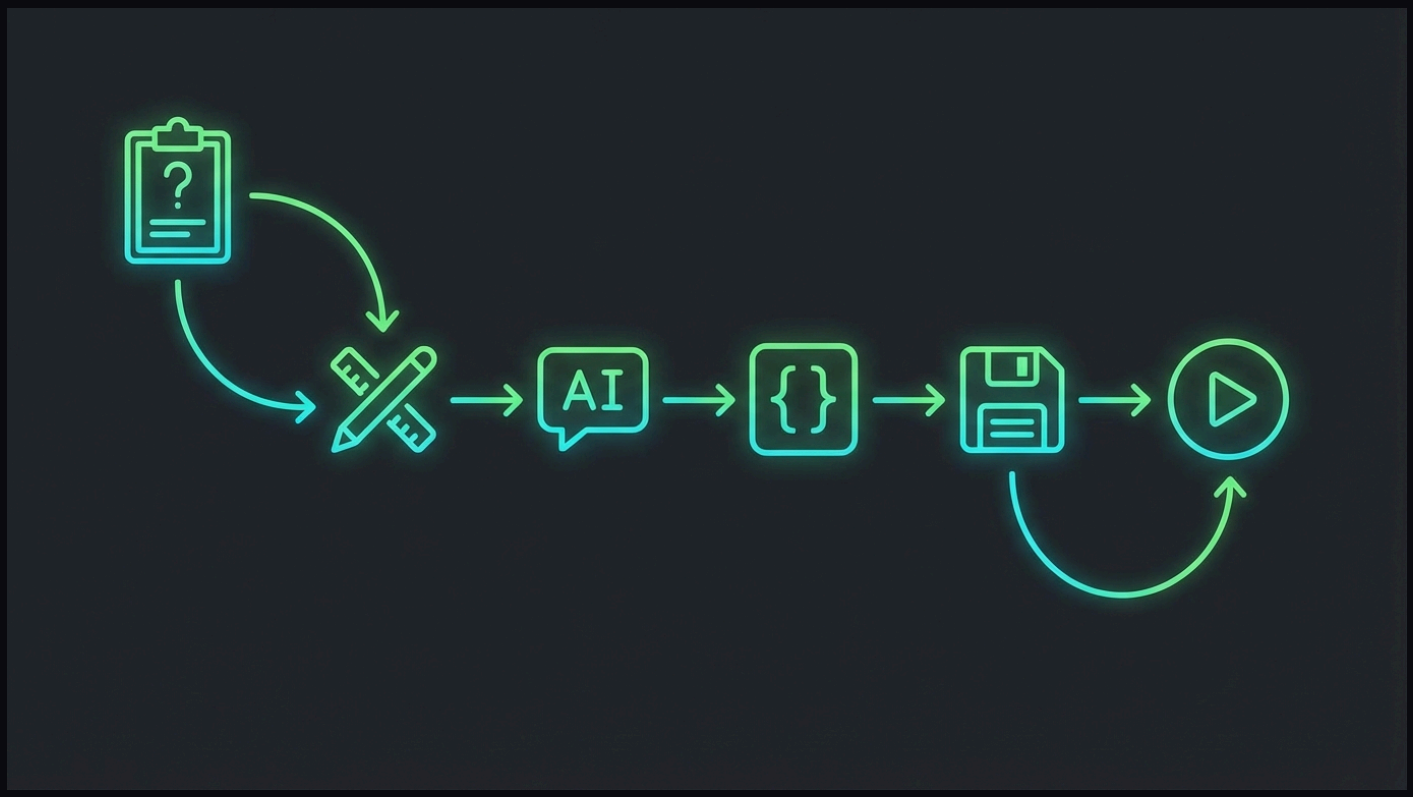


By Luis Aviles // Operations Architect

HOW TO USE THIS GUIDE

Your AI Automation Toolkit

Each automation includes: **The Prompt** (copy and customize), **Info to Provide** (what helps AI build it right), and **Pro Tips** (how to get better results).



#01

EXCEL / DATA

Auto-Format Report Macro

Formats your weekly report with consistent styling - one click instead of 15 minutes.

THE PROMPT

```
Create an Excel VBA macro that formats my [report type] report. Apply [company colors] to headers, set column widths, add borders, format numbers as [currency/percentage], freeze top row, add timestamp in [cell]. Data has [X] columns starting row [2].
```

PRO TIP

Ask AI to add a keyboard shortcut (Ctrl+Shift+F) so you can run it instantly.

#02

EXCEL / DATA

Data Cleanup Macro

Removes duplicates, trims whitespace, fixes formatting, standardizes text case.

THE PROMPT

```
Create an Excel VBA macro that cleans data: Remove duplicates based on [column], trim extra spaces, convert [column] to [UPPERCASE/Proper Case], standardize [phone/date] format, remove blank rows, sort by [column]. Show completion message with row count.
```

> PRO TIP
>
> Ask AI to create a backup sheet before cleaning so you can undo if needed.

#03

EXCEL / REPORTS

One-Click Dashboard Refresh

Refreshes all pivot tables, data connections, and recalculates formulas.

THE PROMPT

```
Create an Excel VBA macro that: Refreshes all pivot tables, refreshes all data connections/queries, recalculates all formulas, updates "Last Refreshed" cell to current date/time, shows completion message. Handle errors gracefully if any refresh fails.
```

> PRO TIP
>
> Ask AI to add a button to your dashboard sheet that runs this macro.

#04 FILE MANAGEMENT

Downloads Folder Organizer

Sorts downloads by file type into folders, renames with dates, cleans up old files.

THE PROMPT

```
Create a Python script that organizes my Downloads folder: Move PDFs to "Documents", images to "Images", videos to "Videos", installers to "Installers". Rename files to include date: originalname_2024-01-15.ext. Delete files older than [30/60] days (optional). Create subfolders if needed. Include a .cmd file to double-click run.
```

HOW TO DEPLOY

1. Save Python file as organize_downloads.py
2. Save .cmd file in same folder
3. Double-click .cmd to run
4. Optional: Add to Task Scheduler for daily runs

#05 EMAIL

Email Template Generator

Reads customer data from Excel and generates personalized emails ready to send.

THE PROMPT

```
Create a Python script that: Reads customer data from Excel (columns: [Name, Email, Company]), generates personalized emails using my template, saves each email as "email_[Name].txt", creates summary of all emails generated. Include .cmd file.
```

PRO TIP

Start with text files to review, then ask AI to add direct Outlook sending later.

#06 DATA TRANSFER

System-to-System Format Converter

Takes export from System A and reformats it for import into System B.

THE PROMPT

```
Create a Python script that converts data between formats: INPUT from [System A]: [CSV/Excel], columns: [list] OUTPUT for [System B]: [CSV/Excel], columns: [list] Column mappings: [A_Col → B_Col] Apply transformations: [date format, cleanup]. Save with timestamp.
```

INFO TO PROVIDE

- → Sample export from System A (or exact format description)
- → Import requirements for System B
- → Data transformations needed

#07 TEXT PROCESSING

Clipboard Text Cleaner

Hotkey that cleans clipboard text - removes formatting, fixes spacing, standardizes.

THE PROMPT

```
Create a Python script that: Reads clipboard, cleans by removing extra whitespace/line breaks, converting smart quotes to regular, removing hidden characters. Puts cleaned text back in clipboard, shows notification "Cleaned!". Use pynput for hotkey: [Ctrl+Shift+C].
```

> PRO TIP
>
> Ask AI to make it run on Windows startup so the hotkey is always available.

#08

EXCEL / DATA ENTRY

Data Entry Form Macro

Popup form for data entry with validation that adds to spreadsheet consistently.

THE PROMPT

```
Create an Excel VBA UserForm with fields: [Field1: text/dropdown], [Field2: date], [Field3: dropdown]. Validation: [Field] required, [Field] must be valid email. On submit: add to next empty row in [Sheet], auto-fill today's date, clear form, keep open for more entries.
```

INFO TO PROVIDE

- → All fields to capture (required vs optional)
- → Dropdown options for list fields
- → Which sheet/columns receive the data

#09

REPORTING

PDF Report Generator

Pulls data from Excel and generates a formatted PDF report.

THE PROMPT

```
Create a Python script that generates a PDF report: Read data from [Excel file], create PDF with title "[Report Name]", date generated, summary stats (total, average), data table with key columns. Use reportlab library. Save as "Report_YYYY-MM-DD.pdf". Include .cmd file.
```

#10 BACKUP / SAFETY

Auto-Backup Script

Backs up important files/folders to backup location with dated folders.

THE PROMPT

```
Create Python script that backs up: Source folders: [paths]. Destination: [backup path]. Create dated folder (Backup_2024-01-15), copy files, skip unchanged files, log what was backed up, delete backups older than [30] days, show summary. Include .cmd and Task Scheduler instructions.
```

SCHEDULING (WINDOWS TASK SCHEDULER)

1. Open Task Scheduler → Create Basic Task
2. Set trigger (weekly, daily)
3. Action: Start program → your .cmd file
4. Done - runs automatically!

Quick Reference: What to Tell AI

Instead of...	Say this...
"Make it work with my files"	"Files are in C:\Reports, named report_MMYYYY.xlsx"
"Format the dates"	"Convert dates from MM/DD/YYYY to YYYY-MM-DD"
"Clean the data"	"Remove duplicates by email, trim whitespace, Title Case names"

You're Ready to Automate

Every automation in this guide started as a repetitive task someone was doing manually.

Now you have the prompts. You have the process. Pick one task that eats your time, copy the relevant prompt, customize it, and ask AI to build it for you.

You don't need to be a programmer. You just need to describe what you want clearly. AI handles the rest.

Start with one. Then build another. Before you know it, you'll have a toolkit of automations that save you hours every week.

THE PATTERN

Identify repetitive task → Ask AI to build a tool → Package it → Own it forever

The question isn't "can AI do this task for me?"

It's "can AI build something that does this task forever?"

Created by Luis Aviles // Operations Architect
From Spreadsheets to Systems